North East England
Annual Aggregates Monitoring Report
2013




Published

December 2014

North East Aggregates Working Party

County Durham | Northumberland | Tees Valley | Tyne and Wear

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For further information on this document and the North East Aggregates Working Party, please contact:

Kevin Tipple
Secretary to the North East Aggregates Working Party

Northumberland County Council
Planning and Housing Services
County Hall
Morpeth
Northumberland
NE61 2EF

Telephone: 01670 623631
Email: Kevin.Tipple@northumberland.gov.uk

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Executive Summary

This report has been prepared by the North East Aggregates Working Party and presents statistical information on sales of aggregate minerals from North East England in 2013 and the permitted reserves of aggregate minerals at 31 December 2013. The report also provides information on planning applications relating to the extraction of minerals for aggregate use and sales of recycled and secondary aggregates.

North East Aggregates Working Party

- The North East Aggregates Working Party covers a cluster of thirteen Mineral Planning Authorities in North East England over the sub-regional areas of County Durham, Northumberland, Tees Valley and Tyne and Wear.

- The North East Aggregates Working Party is one of a number of similar groups throughout England and Wales. Its membership is made up of the Mineral Planning Authorities in North East England and the aggregates industry. The Aggregates Working Party has a role in helping to plan for a steady and adequate supply of aggregate minerals through providing data on sales, reserves and planning permissions for aggregate minerals and providing technical advice on the supply and demand for aggregates from their areas.

Primary aggregate sales and reserves

- Sales of primary aggregates from North East England in 2013 were 4.7 million tonnes (see table below). Sales included 3.6 million tonnes of crushed rock, 716,000 tonnes of land-won sand and gravel and 451,000 tonnes of marine-dredged sand and gravel.

- Sales of primary aggregates from North East England in 2013 have decreased by 39.7% when compared with sales in 2007. This includes a 37% decrease in sales of crushed rock, a 31% decrease in sales of land-won sand and gravel and a 60% decrease in sales of marine-dredged sand and gravel. This decrease is considered to be mainly as a result of the economic downturn and the resulting reduction in demand for primary aggregates. It does, however, appear that the level of sales have stabilised somewhat following the significant decline in the period from 2007 to 2009.

Primary aggregates sales from North East England, 2004 to 2013 (thousand tonnes)

Year	Crushed rock	Land won sand and gravel	Marine dredged sand and gravel	**Total primary aggregates**
2004	6,512	1,315	1,110	**8,937**
2005	5,740	1,360	1,049	**8,149**
2006	5,652	1,325	1,142	**8,119**
2007	5,689	1,037	1,132	**7,858**
2008	5,079	926	998	**7,003**
2009	3,379	757	563	**4,699**
2010	3,469	757	678	**4,904**
2011	3,433	869	509	**4,812**
2012	3,181	713	491	**4,385**
2013	3,569	716	451	**4,736**

- At 31 December 2013, North East England had 20.2 million tonnes of permitted sand and gravel reserves and 220.4 million tonnes of permitted crushed rock reserves.

- This equated to a landbank of 16.1 years for sand and gravel and a landbank of 38.6 years for crushed rock when calculated using the annual average sales over the previous ten years. These landbank figures are above the landbank indicator of 7 years for sand and gravel and the landbank indicator of 10 years for crushed rock that is set out in the National Planning Policy Framework.

Permitted reserves and landbank of primary aggregates in North East England at 31 December 2013

	Permitted reserves	**Landbank**[1]
Sand and gravel	20.2 million tonnes	16.1 years
Crushed rock	220.4 million tonnes	38.6 years

[1] Landbank calculated using provision set out in Local Aggregates Assessments or adopted Local Plans.

Planning applications for the extraction of primary aggregates

- Approvals – one planning application for the extraction of additional sand and gravel reserves was approved in North East England during 2013. This involves the proposed extraction of 2.5 million tonnes of sand and gravel from a new quarry, Low Harperley in County Durham. No additional reserves of hard rock were granted planning permission for extraction in 2013.

- Refusals – No planning applications for the extraction of additional reserves of primary aggregates were refused planning permission in North East England during 2013.

- Pending – Planning applications potentially involving the extraction of 13.7 million tonnes of crushed rock and 6.5 million tonnes of sand and gravel were pending determination at 31 December 2013.

Quantities of primary aggregates subject to planning applications in North East England in 2013 (thousand tonnes)

	Crushed rock			Sand and gravel		
	Approved	Refused	Pending	Approved	Refused	Pending
County Durham	0	0	7,750	2,500	0	0
Northumberland	0	0	0	0	0	0
Tees Valley	0	0	0	0	0	0
Tyne and Wear	0	0	6,000	0	0	6,550
North East England	**0**	**0**	**13,750**	**2,500**	**0**	**6,550**

Recycled and secondary aggregates sales

- The 2013 survey of fixed construction and demolition recycling facilities and secondary aggregates producers found 1.25 million tonnes of recycled and secondary aggregate were sold from North East England in 2013.

- Sources of recycled and secondary aggregates included construction and demolition waste, spent road planings, ash from the Lynemouth Power Station in Northumberland and the Haverton Hill Energy from Waste Plant on Teesside and materials originating from the steelworks at Redcar.

- This recycled and secondary aggregates sales figure for 2013 should be treated with some degree of caution as not all producers in North East England responded to the survey and have thus not been included in the figures. In addition, the survey does not include mobile crushers and screens which are known to make a significant contribution in terms of the quantities of construction and demolition waste recycled for aggregate uses.

1. Introduction

1.1 The North East Aggregates Working Party is one of a number of similar working parties throughout England and Wales originally established in the 1970s to collect data and monitor the production and supply of aggregate minerals, the reserves of aggregate minerals covered by valid planning permissions and provide technical advice on the supply and demand for aggregates from their areas. The aggregates working parties are a joint local government, central government and industry body. Funding for the secretariat is provided by Department for Communities and Local Government but the members of the Aggregates Working Party provide their time on a voluntary basis.

1.2 There are thirteen mineral planning authorities in North East England Aggregates Working Party cluster area (see Figure 1.1). This includes seven unitary authorities, five metropolitan borough authorities and one National Park authority in four sub-regional clusters:

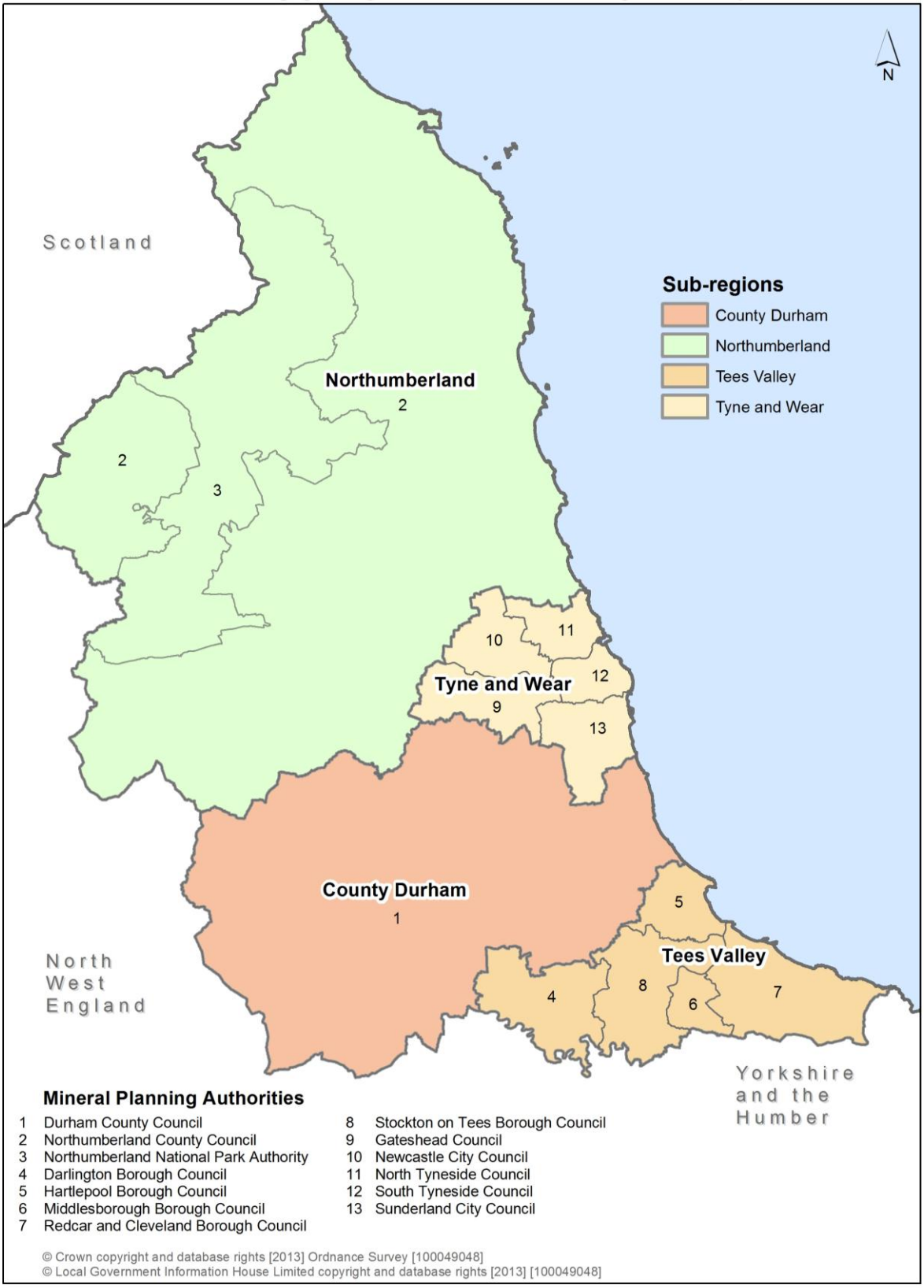
- County Durham (Durham County Council);
- Northumberland (Northumberland County Council and Northumberland National Park Authority);
- Tees Valley (Darlington Borough Council, Hartlepool Borough Council, Middlesbrough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council); and
- Tyne and Wear (Gateshead Council, Newcastle City Council, North Tyneside Council, South Tyneside Council and Sunderland City Council).

1.3 The North East England Aggregates Working Party cluster covers around 850,000 hectares between the Scottish Borders to the north, North West England to the west, Yorkshire and Humber to south and the North Sea to the east. The area has a population of over 2.5 million, primarily concentrated in the two conurbations of Tyne and Wear and Tees Valley. The remainder of North England is mostly rural in character and sparsely populated.

1.4 The distinctiveness and special nature of the environment and landscape is recognised with a number of national designations. This includes the Northumberland National Park, Northumberland Coast Area of Outstanding Natural Beauty and the North Pennines Area of Outstanding Natural Beauty.

1.5 In North East England a wide variety of mineral resources are found and extracted. The most important primary aggregate resources are Carboniferous limestone, magnesian limestone, igneous rock, Permian sand and glacial and fluvial sand and gravel.

Figure 1.1: North East Aggregates Working Party area



1.6 This report presents information for North East England on sales of primary aggregates in 2013, permitted reserves of primary aggregates as at 31 December 2013 and the quantity of aggregate minerals granted and refused planning permission in 2013. Information relating to the production and use of recycled and secondary aggregates is also provided. In addition, this report gives an update of progress with the preparation of development plans applicable to minerals.

1.7 Detailed information from the previous aggregates monitoring surveys covering North East England can be found in previous Annual Aggregates Monitoring Reports produced by the North East Aggregates Working Party (see Appendix 6). The Aggregates Monitoring Survey for 2009 was part of a more comprehensive national survey that usually undertaken every four years by the Department for Communities and Local Government. The aim of the survey was to provide an in-depth and up-to-date understanding of regional and national sales, inter-regional flows, transportation and permitted reserves of primary aggregates. A report collating the results of the national survey is available to view on the website of the Department for Communities and Local Government. The next national survey of this nature will be undertaken for the 2014 survey year.

2. Planning policy context

2.1 Planning policy for aggregate minerals is contained in the National Planning Policy Framework (NPPF) (March 2012). The NPPF recognises that minerals are essential to economic growth and quality of life and that it is important that there is a sufficient supply of minerals to deliver the infrastructure and buildings the country needs.

2.2 The approach to planning for aggregate minerals is underpinned by a Managed Aggregates Supply System (MASS). This seeks to ensure there is a steady and adequate supply of aggregate minerals to meet the needs of the construction industry and ensure the geographical imbalances between the occurrence of suitable aggregates and the areas where most demand arises are appropriately addressed at the local level. For example, in North East England, County Durham and Northumberland are net exporters of aggregates to the more urban areas of Tyne and Wear and Tees Valley, where suitable aggregate mineral resources are less abundant.

2.3 One of the key elements of the MASS involves the preparation of a Local Aggregate Assessment by each Mineral Planning Authority. The Local Aggregate Assessments are expected to forecast demand based on a rolling average of 10 years sales data, supply options, the balance between supply and demand and the environmental and economic constraints and opportunities that could influence supply. The Local Aggregate Assessment should is also to indicate whether there is a surplus or shortage of supply and if there is a shortage how this is being addressed.

2.4 National and sub-national guidelines for the provision of aggregate minerals are also published by central government to provide an indication of the total amount of aggregate the Mineral Planning Authorities, collectively within each AWP cluster, should aim to provide. While there is no expectation that each AWP should meet the guidelines, particularly if the environmental cost of doing so is likely to be unacceptable, the guidelines are a material consideration when determining the soundness of minerals plans and in making decisions on planning applications. The most up-to-date guidelines for aggregates provision were published in June 2009 and are shown in Table 2.1.

2.5 This current approach differs from way the MASS operated in the past. Previously the MASS had more of a ‘top-down’ approach and involved central Government issuing national and sub-national guidelines for aggregates provision, based on forecasts of demand for aggregate minerals, with the AWPs then providing technical advice on how these guidelines should be apportioned to each mineral planning authority in their area. The mineral planning authorities were then expected to make provision for this apportionment in their local plan. The approach to MASS was amended to reflect the Government’s more localist approach to planning matters.

Table 2.1: National and regional guidelines for aggregates provision in England, 2005 to 2020 (million tonnes)

	Guidelines for land-won production		Assumptions		
	Sand and gravel	Crushed rock	Marine-dredged sand and gravel	Alternative materials	Net imports to England
South East England	195	25	121	130	31
London	18	0	72	95	12
East of England	236	8	14	117	7
East Midlands	174	500	0	110	0
West Midlands	165	82	0	100	23
South West England	85	412	12	142	5
North West England	52	154	15	117	55
Yorkshire Humber	78	212	5	133	3
North East England	24	99	20	50	0
England	**1,028**	**1,492**	**259**	**993**	**136**

3. Production and reserves of primary aggregates: Crushed rock

Overview

3.1 This chapter sets out information on sales and permitted reserves of crushed rock in North East England. Information is also presented on planning applications for crushed rock extraction for aggregate use.

Sites producing crushed rock

3.2 There were twenty quarries producing crushed rock aggregate in North East England in 2013 (see Table 3.1 below). In addition to these active sites, a further eight quarries were 'inactive'[2]. This includes quarries that have been mothballed or have gained planning consent for extraction but extraction has yet to commence. Further details of both the active and inactive sites are provided in Appendix 1.

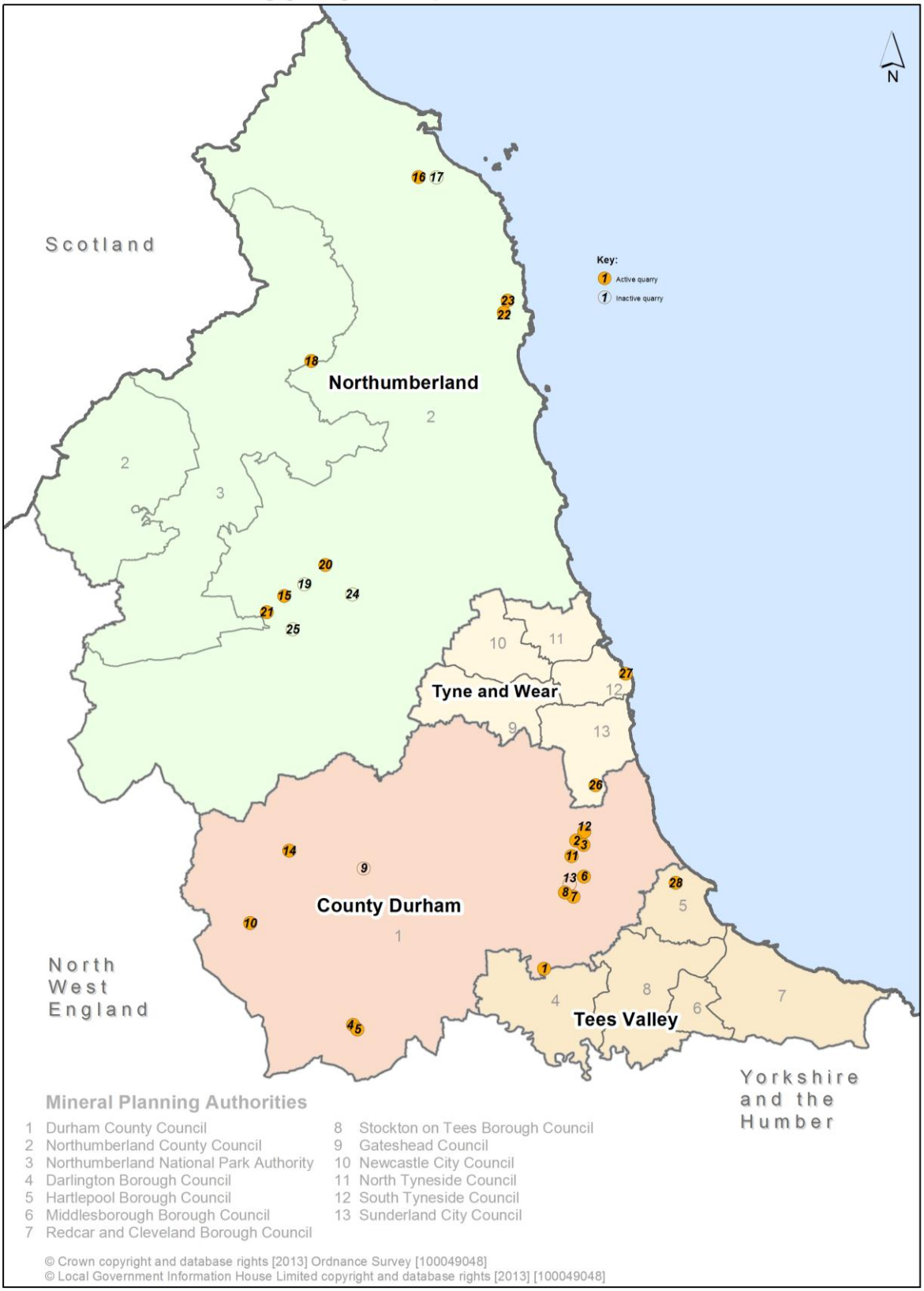
Table 3.1: Crushed rock aggregate sites in North East England, 2012

Sub-area	Active sites in 2012	Inactive sites in 2012
County Durham	• Aycliffe Quarry (1) • Bishop Middleham Quarry (7) • Coxhoe (Raisby) Quarry (6) • Crime Rigg Quarry (12) • Kilmond Wood Quarry (5) • Heights Quarry (14) • Hulands Quarry (4) • Middleton (Force Garth) Quarry (10) • Old Quarrington and Cold Knuckle Quarry (11) • Thrislington Quarry (8)	• Broadwood Quarry (9) • Cornforth Quarry (13) • Running Waters Quarry (2) • Witch Hill Quarry (3)
Northumberland	• Barrasford Quarry (15) • Cragmill Quarry (16) • Divethill Quarry (20) • Harden Quarry (18) • Howick Quarry (23) • Keepershield Quarry (21) • Longhoughton (Ratcleugh) Quarry (22)	• Belford (Easington) Quarry (17) • Cocklaw Quarry (25) • Mootlaw Quarry (24) • Swinburne Quarry (19)
Tees Valley	• Hart Quarry (28)	
Tyne and Wear	• Eppleton Quarry (26) • Marsden Quarry (27)	

Notes: (1) – Numbers relate to the corresponding numbers shown on the map in Figure 3.2

[2] The definition of 'inactive' sites only includes sites that have a valid planning permission and does not include dormant sites or sites that do not have a valid planning permission.

Figure 3.2: Crushed rock aggregate quarries in North East England



Crushed rock sales

3.3 Information on sales of crushed rock from quarries in North East England in 2013, along with sales in previous monitoring periods, is provided in Table 3.3. Sales from North East England in 2012 were 3.6 million tonnes. 63% of sales were from quarries in County Durham, 30% were from quarries in Northumberland and the remaining 7% of sales was from sites in Tees Valley and Tyne and Wear.

3.4 Sales of crushed rock decreased by 37% between 2007 (5.7 million tonnes) and 2013 (3.6 million tonnes). This decrease is considered to be mainly a result of the economic downturn and a resulting reduction in demand for primary aggregates. Following a significant decrease in sales in 2009, sales of crushed rock for aggregate use from North East England have remained at a broadly similar level in the period from 2009 to 2013 reflecting the economic conditions.

Table 3.3: Sales of crushed rock for aggregate use from North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tyne and Wear	Tees Valley	**North East England**
2004	3,841†	2,281	*	*	**6,512**
2005	3,777	1,696	83	184	**5,740**
2006	3,384	1,796	#	#	**5,652**
2007	3,559	1,676	#	#	**5,689**
2008	3,036	1,664	#	#	**5,079**
2009	1,920	1,153	#	#	**3,379**
2010	2,056	1,188	#	#	**3,462**
2011	1,955	1,230	#	#	**3,433**
2012	1,696	1,233	#	#	**3,181**
2013	2,245	1,060	#	#	**3,569**
Ten year sales average	**2,704+**	**1,498**	**No figure available**	**No figure available**	**4,570**

Notes:
 # Confidential figure included in the figure for North East England
** Confidential figure included in the figure for County Durham*
† Includes sales from Tees Valley and Tyne and Wear
+ Estimate due to actual sales for 2004 being combined with Tees Valley

3.5 The sales of crushed rock by broad end-use product categories and mineral type are shown in Table 3.4. These end-use figures should be treated with some caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. The crushed rock extracted in North East England has a wide range of end-uses and this can vary depending on mineral type. Coated roadstone (11%), uncoated roadstone (20%), concrete aggregate (18%), other screened and graded aggregates (16%) and other constructional use (19%) represent the main end-uses for aggregates from quarries in North East England. Table 3.4 also shows that a specific end-use was not identified for 14% of crushed rock sales, although it is known that this material had an aggregate end-use.

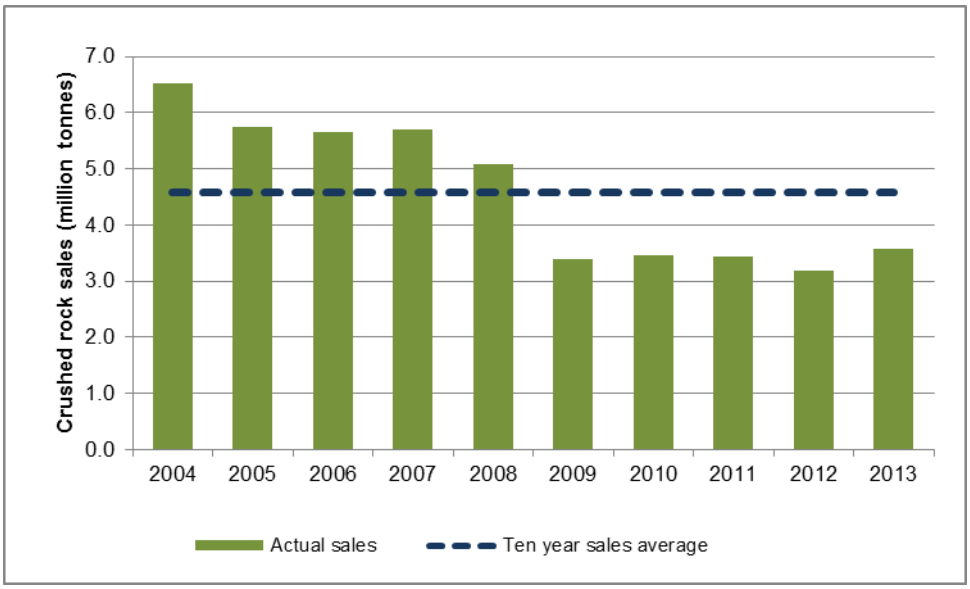
Table 3.4: Sales of crushed rock for aggregate use in North East England by mineral resource and end-use, 2013 (tonnes)

	Carboniferous limestone	Magnesian limestone	Igneous rock	Total crushed rock
Coated roadstone*	7,486	94	366,508	374,088
Uncoated roadstone (Type 1 and Type 2)	10,829	550,046	166,293	727,168
Uncoated roadstone (surface chippings)	0	0	19,909	19,909
Rail ballast	0	0	794	794
Concrete aggregate	20,175	487,128	118,528	625,831
Other screened/graded	1,297	406,995	167,980	576,272
Armour/gabion stone	12	30,597	19,869	50,478
Other constructional use	11,000	431,781	249,416	692,197
Unknown end-use	443,425	0	58,982	502,407
Total	**494,224**	**1,906,641**	**1,168,279**	**3,569,144**

Notes:
** Coated roadstone includes crushed rock used for asphalt manufacture on and off site*

3.6 A comparison between actual sales of crushed rock from North East England and the ten year sales average is shown in Figure 3.5. The ten year sales average for crushed rock from North East England is 4,570,100 tonnes. Sales of crushed rock over the period between 2009 and 2013 are below this ten year sales average, following a significant reduction in sales compared to sales prior to 2008. As stated above, it is considered that sales have fallen below the ten year sales average in recent monitoring periods due to the economic downturn and a reduction in construction activity.

Figure 3.5: Comparison of actual sales of crushed rock from North East England and the ten year sales average, 2004 to 2013



3.7 In addition to sales from quarries in North East England, a contribution to crushed rock supply was made via imports of crushed rock to wharf sites. In 2013 59,982 tonnes of crushed rock from Glensanda Quarry was imported via Battleship Wharf in Northumberland and 100,000 tonnes of crushed rock from outside of the UK was imported via Greenwells Quay in Sunderland.

Crushed rock reserves

3.8 The permitted reserves of crushed rock at quarries in North East England at 31 December 2013 were 220.4 million tonnes (Table 3.6). This represents an increase in permitted reserves from 2012. This increase is largely accounted for by a re-assessment and clarification of the permitted reserves that are available for aggregate uses at Thrislington Quarry in County Durham. A large proportion of the permitted reserves of crushed rock in North East England are found at quarries in County Durham (63.8%) and Northumberland (34.8%), with only a small proportion found at sites in Tees Valley and Tyne and Wear (1.4%).

Table 3.6: Permitted reserves of crushed rock at quarries in North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	**North East England**
2004	136,646[†]	80,270	*	1,955	**214,672**
2005	144,875	76,056	4,100	3,918	**228,950**
2006	174,647	79,986	#	#	**257,298**
2007	140,563	78,385	#	#	**221,506**
2008	136,326	78.422	#	#	**216,986**
2009	137,893	76,433	#	#	**216,555**
2010	135,205	79,098	#	#	**216,469**
2011	136,734	78,004	#	#	**218,249**
2012	134,065	77,264	#	#	**214,528**
2013	140,732	76,643	#	#	**220,373**

Notes:
 # Confidential figure included in the figure for North East England
** Confidential figure included in County Durham figure*
[†] Includes reserve figure for Tees Valley

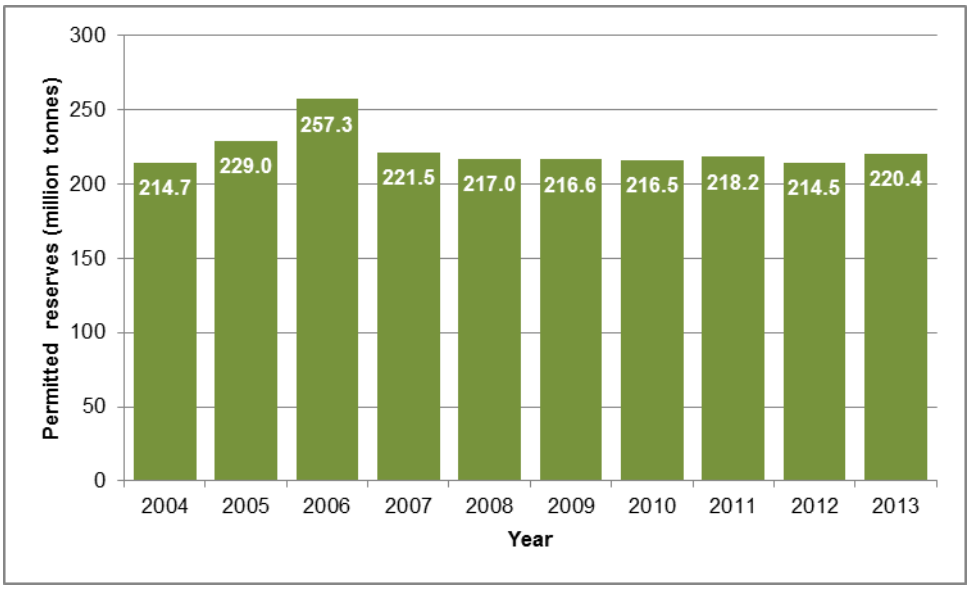
3.9 The permitted reserves of crushed rock in North East England by resource type are shown in Table 3.7. The most significant resources in terms of their contribution to the total permitted reserves in North East England are magnesian limestone (52.8%) and igneous rock (39.2%). The remaining permitted reserves are Carboniferous limestone (8.0%). The reserves of magnesian limestone are mainly concentrated in County Durham, while the reserves of igneous rock are mainly concentrated in Northumberland.

Table 3.7: Permitted reserves of crushed rock at quarries in North East England by mineral resource, at 31 December 2013 (tonnes)

Carboniferous limestone	**Magnesian limestone**	**Igneous rock**	**Total crushed rock**
17,717,866	116,294,490	86,360,733	220,373,089

3.10 A comparison of the level of permitted over the last ten monitoring periods is shown in Figure 3.8.

Figure 3.8: Comparison of permitted reserves of crushed rock at quarries in North East England, 31 December 2004 to 31 December 2013



Crushed rock landbank

3.11 The National Planning Policy Framework (Paragraph 145) states that Mineral Planning Authorities should use the length of the landbank in their area to indicate the additional provision that needs to be made for new aggregates extraction. It specifies that the landbank indicator is at least 10 years for crushed rock.

Table 3.9: Landbank of permitted crushed rock reserves in North East England as at 31 December 2013

	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
Reserves at 31 December 2013 (tonnes)	140,731,600	76,642,599	#	#	**220,373,089**
Annual provision (tonnes)	3,373,000*	1,868,000*	137,500[+]	328,000*	**5,706,500**
Landbank at 31 December 2013 (years)	41.7	41.0	#	#	**38.6**

Notes:

 # - Reserve and landbank figures for Tees Valley and Tyne and Wear have not been published due to the small number of sites in these areas and the requirement not to disclose confidential individual site information.

** - Figure taken from Joint local Aggregates Assessment for County Durham, Northumberland and Tyne and Wear.*

[+] - Figure taken from adopted Tees Valley Joint Minerals and Waste Core Strategy.

3.12 The landbanks for sand and gravel have been calculated using the provision set out in the most up-to-date Local Aggregates Assessments or adopted Local Plans. The landbank of permitted reserves in North East England at 31 December 2013 and the landbanks for the four sub-regions are shown in Table 3.9. North East England had a crushed rock landbank of 13.2 years at 31 December 2013. This is above the landbank indicator of 7 years as set out in the National Planning Policy Framework.

Planning applications for crushed rock extraction

3.13 The North East Aggregates Working Party monitors the nature and outcome of planning applications for aggregates extraction in North East England on an annual basis. Table 3.10 details the quantities of crushed rock granted or refused planning permission for extraction between 1 January 2013 and 31 December 2013 and the quantities subject to planning applications that were pending determination at 31 December 2013. Further detail on each of the planning applications is shown in Appendix 3.

3.14 Between 1 January 2013 and 31 December 2013 there were no additional reserves of crushed rock granted planning permission for extraction. At 31 December 2013, three planning applications were pending determination involving the potential extraction of 13.75 million tonnes of rock for aggregate uses. This includes an application for an extension at Eppleton Quarry within the Tyne and Wear sub-area (6 million tonnes of magnesian limestone) and two applications for the reactivation of dormant planning permissions at quarries in County Durham (4 million tonnes of Carboniferous limestone and 3.75 million tonnes of magnesian limestone). No planning applications for crushed rock extraction were refused planning permission during 2013 in North East England.

Table 3.10: Quantities of crushed rock subject to planning applications in the North East England during 2013 (thousand tonnes)

	Approved	Refused	Pending
County Durham	0	0	7,750
Northumberland	0	0	0
Tees Valley	0	0	0
Tyne and Wear	0	0	6,000
North East England	**0**	**0**	**13,750**

Notes:

Reserve information collected from planning application submissions
Does not include reserves subject to applications to extend the time period for extraction

4. Production and reserves of primary aggregates: land won sand and gravel

Overview

4.1 This chapter sets out information on sales and permitted reserves of sand and gravel in North East England. Information is also presented on planning applications for sand and gravel extraction for aggregate use.

Sites producing sand and gravel

4.2 In 2013 there were ten quarries in North East England producing land-won sand and gravel for aggregate use (see Table 4.1 below). In addition to these active sites, a further six quarries were 'inactive'[3] in 2013. This includes quarries that have been mothballed or have gained planning consent for extraction but extraction has yet to commence. The latter is the case for Low Harperley in County Durham. Further details of the both active and inactive sites are provided in Appendix 1.

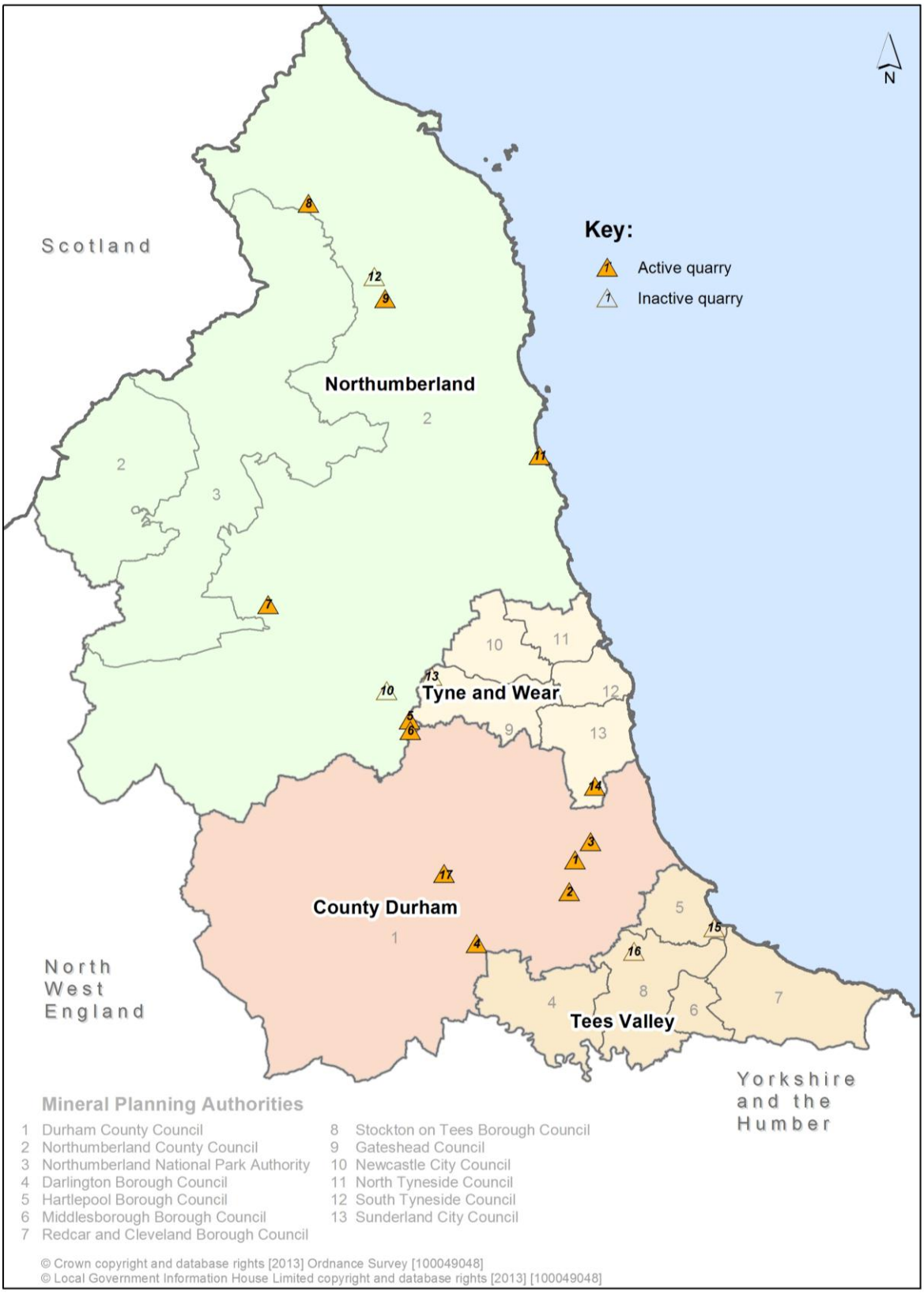
Table 4.1: Sand and gravel aggregate quarries in North East England, 2013

Sub-area	Active sites in 2013	Inactive sites in 2013
County Durham	• Crime Rigg Quarry (3) • Old Quarrington and Cold Knuckle Quarry (1) • Thrislington Quarry (2)	• Hummerbeck Quarry (4) • Low Harperley Quarry (17)
Northumberland	• Broadoak Quarry (6) • Haughton Strother Quarry (7) • Hedgeley Quarry (9) • Hemscott Hill Beach (11) • Hollings Hill Quarry (5) • Lanton (Cheviot) Quarry (8)	• Merryshields Quarry (10) • Wooperton Quarry (12)
Tees Valley		• Hartlepool Beach (15) • Stockton (Thorpe Thewles) Quarry (16)
Tyne and Wear	• Eppleton Quarry (14)	

Notes: (1) – Numbers relate to the corresponding numbers shown on the map in Figure 4.2

[3] The definition of 'inactive' sites only includes sites that have a valid planning permission and does not include dormant sites or sites that do not have a valid planning permission.

Figure 4.2: Sand and gravel aggregate quarries in North East England



Sand and gravel sales

4.3 Information on sales of land-won sand and gravel from quarries in North East England in 2013, along with sales from previous monitoring periods, is provided in Table 4.3. Sales of land-won sand and gravel decreased by 46% between 2004 (1,315,000 tonnes) and 2013 (716,000 tonnes). This decrease is considered to be mainly a result of the economic downturn and a resulting reduction in demand for primary aggregates. Following a significant decrease in sales between 2007 and 2009, sales of land-won sand and gravel for aggregate use from North East England have remained at a similar level in the period from 2009 to 2013 reflecting current economic conditions.

Table 4.3: Sales of sand and gravel for aggregate use from North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	**North East England**
2004	395	638	*	638	**1,315**
2005	431†	576	*	353	**1,360**
2006	391†	505	*	409	**1,305**
2007	221†	574	*	241	**1,037**
2008	183	515	#	#	**926**
2009	199	425	#	#	**757**
2010	164	402	#	#	**757**
2011	237	450	#	#	**869**
2012	199	349	0	#	**713**
2013	218	320	0	#	**716**
Ten year sales average	**256+**	**476**	**Figure not available**	**Figure not available**	**976**

Note;
 # Confidential figure included in the sales figure for North East England
** Confidential figure included in the sales figure for County Durham figure*
† Includes sales from Tees Valley
+ Estimate due to actual sales for 2005, 2006 and 2007 being combined with Tees Valley

4.4 The sales of land-won sand and gravel by broad end-use product categories are shown in Table 4.4. These end-use figures should be treated with some degree of caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. Concreting sand and sand for use in mortar were the largest products for land won sand and gravel sales in 2013, accounting for 25% and 44% of sales for aggregate use respectively.

Table 4.4: Sales of land-won sand and gravel for aggregates by end-use from North East England in 2013 (tonnes)

End-use	Land won sand and gravel sales (tonnes)
Sand for asphalt	62,471
Sand for use in mortar	317,619
Concreting and sharp sand	175,553
Gravel for asphalt	0
Gravel for concrete aggregate	83,635
Other screened/graded gravel	38,968
Other sand and gravel	21,689
Sand and gravel with unknown end-use	16,033
Total sand and gravel	**715,968**

4.5 A comparison between actual sales of land-won sand and gravel in North East England and the ten year sales average is shown in Figure 4.5. The ten year average sales of land-won sand and gravel from North East England for the period from 2004 to 2013 is 975,500 million tonnes. Sales in 2013 were 715,968 tonnes, which is below the ten year sales average by around 260,000 tonnes. Sales of land-won sand and gravel over the period between 2008 and 2013 are below the ten year sales average, following a significant reduction in sales over this period in comparison with sales prior to 2008. Sales have fallen below the ten year sales average due to a reduction in demand as a result of the economic downturn and a reduction in construction activity.

Figure 4.5: Comparison of actual sales of land-won sand and gravel from North East England and the ten year sales average, 2004 to 2013

Permitted reserves of sand and gravel

4.5 The permitted reserves of sand and gravel in North East England at 31 December 2013 were 20.2 million tonnes (Table 4.6). This represents an increase in permitted reserves of around 2.7 million tonnes from 31 December 2012. This is largely accounted for by planning permission being granted for a new site at Low Harperley in County Durham in 2013.

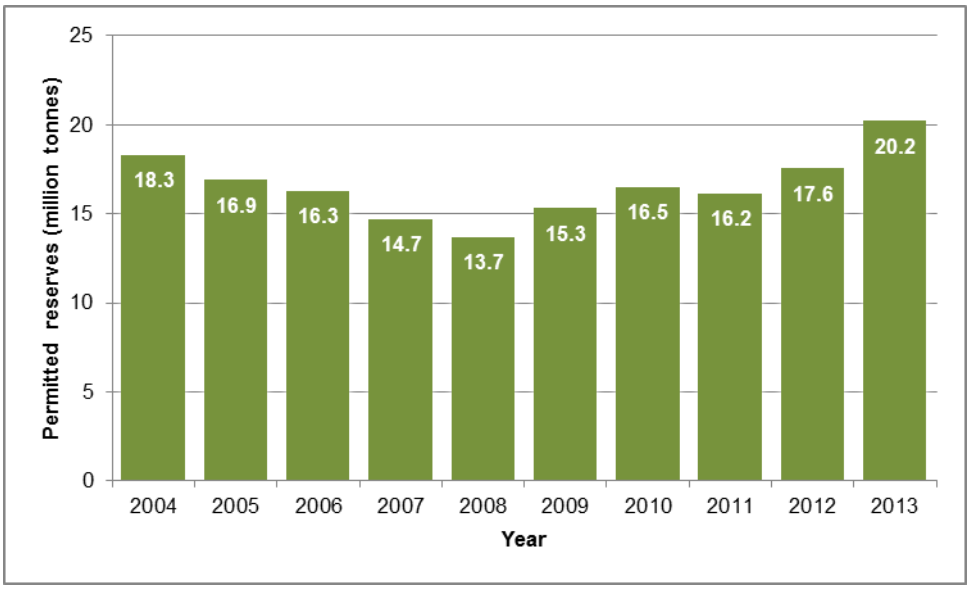
Table 4.6: Permitted reserves of sand and gravel at quarries in North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	**North East England**
2004	6,021†	9,755	*	2,545	**18,321**
2005	5,371†	9,246	*	2,278	**16,895**
2006	2,752	9,629	2,500	1,429	**16,310**
2007	2,296	8,913	2,278	1,199	**14,686**
2008	2,093	8,551	#	#	**13,705**
2009	3,715	8,051	#	#	**15,323**
2010	3,483	9,538	#	#	**16,507**
2011	4,607	8,969	#	#	**16,173**
2012	6,679	8,331	#	#	**17,551**
2013	8,924	7,728	#	#	**20,220**

Notes:
 # Confidential figure included in the figure for North East England
** Confidential figure included in Durham figure*
† Includes reserve figure for Tees Valley

4.6 A comparison of the level of permitted over the last ten monitoring periods is illustrated in Figure 4.7. There has been a general decline in level of permitted reserves at quarries in North East England since 2004 and beyond. It is also observed that reserves have increased from a low of 13.7 million tonnes in 2008 and from 2010 to 2013 reserves have been consistently in excess of 16 million tonnes.

Figure 4.7: Comparison of permitted reserves of sand and gravel at quarries in North East England, 31 December 2004 to 31 December 2013



Sand and gravel landbank

4.7 The National Planning Policy Framework (Paragraph 145) states that Mineral Planning Authorities should use the length of the landbank in their area to indicate the additional provision that needs to be made for new aggregates extraction. It specifies that the landbank indicator is at least 7 years for sand and gravel.

Table 4.8: Landbank of permitted sand and gravel reserves in North East England as at 31 December 2013

	County Durham	Northumberland	Tees Valley	Tyne and Wear	North East England
Reserves at 31 December 2013 (tonnes)	8,923,950	7,727,740	#	#	**20,219,690**
Annual provision (tonnes)	319,000*	593,000*	10,000[+]	334,000*	**1,256,000**
Landbank at 31 December 2013 (years)	28.0	13.0	#	#	**16.1**

Notes:

 # - Reserve and landbank figures for Tees Valley and Tyne and Wear have not been published due to the small number of sites in these areas and the requirement not to disclose confidential individual site information.

** - Figure taken from Joint local Aggregates Assessment for County Durham, Northumberland and Tyne and Wear.*

[+] - Figure taken from adopted Tees Valley Joint Minerals and Waste Core Strategy.

4.8 The landbanks for sand and gravel have been calculated using the provision set out in the most up-to-date Local Aggregates Assessments or adopted Local Plans. The landbank of permitted reserves in North East England at 31 December 2013 and the landbanks for the four sub-regions are shown in Table 3.9. North East England had a sand and gravel landbank of 16.1 years at 31 December 2013. This is above the landbank indicator of 10 years as set out in the National Planning Policy Framework.

Planning applications for sand and gravel extraction

4.10 The North East Aggregates Working Party monitors the nature and outcome of planning applications for aggregates extraction in North East England on an annual basis. Table 4.9 details the quantities of sand and gravel granted or refused planning permission for extraction between 1 January 2013 and 31 December 2013 and the quantities subject to planning applications that were pending determination at 31 December 2013. Further detail on each of the planning applications is shown in Appendix 3.

4.11 Between 1 January 2013 and 31 December 2013, one planning application for the extraction of additional sand and gravel reserves was approved in North East England. This application was for a new quarry at Low Harperley in County Durham and involves the potential extraction of 2.5 million tonnes of sand and gravel for aggregate uses. Two planning applications were pending determination at 31 December 2013 and together these involve the potential extraction of 6.5 million tonnes of sand and gravel for aggregate uses. This figure relates to Eppleton Quarry in Sunderland (6,000,000)[4] and Crawcrook Quarry in Gateshead (550,000 tonnes)[5]. No planning applications for sand and gravel extraction were refused planning permission in North East England during 2013.

Table 4.9: Quantities of sand and gravel subject to planning applications in the North East England during 2013 (thousand tonnes)

	Approved	Refused	Pending
County Durham	2,500	0	0
Northumberland	0	0	0
Tees Valley	0	0	0
Tyne and Wear	0	0	6,550
North East England	**2,500**	**0**	**6,550**

Notes:

Reserve information collected from Mineral Planning Authorities and planning application submissions
Does not include reserves subject to applications to extend the time period for extraction

[4] Eppleton Quarry: Planning permission for an extension to Eppleton Quarry is expected to be issued by Sunderland City Council following the completion of a legal agreement.

[5] Crawcrook Quarry: It is understood that the applicant will no longer be proceeding with an application to extend Crawcrook Quarry. A decision on this has yet to be confirmed formally.

5. Production of primary aggregates: Marine sand and gravel

Overview

5.1 This chapter sets out information on sales of marine dredged sand and gravel landed at wharfs in North East England.

Sand and gravel wharfs

5.2 In 2013 there were five wharfs in North East England producing land-won sand and gravel for aggregate use (see Table 5.1 below). This now includes Battleship Wharf at the Port of Blyth in Northumberland, which imports marine sand and gravel principally for use at a concrete manufacturing facility that is also located at Battleship Wharf. In addition to these active wharfs, two sites, Billingham Wharf and Gateshead Wharf, are currently mothballed and were inactive during 2013. Further details of the both active and inactive sites are provided in Appendix 1. There are no active wharfs importing sand and gravel for aggregate use in County Durham or Northumberland.

Table 5.1: Wharfs in North East England for the importation of sand and gravel aggregate sites, 2013

Sub-area	Active sites in 2013	Inactive sites in 2013
Northumberland	• Battleship Wharf	
Tees Valley	• Cochranes Wharf	• Billingham (Able) Wharf
Tyne and Wear	• Howdon Wharf • Jarrow Wharf • Sunderland (Greenwells Quay) Wharf	• Gateshead Wharf

Figure 5.2: Wharf sites in North East England

Marine sand and gravel sales

5.3 Information on sales of marine-dredged sand and gravel from wharfs in North East England in 2013, along with sales in previous monitoring periods, is provided in Table 5.3.

5.4 Sales of sand and gravel from marine wharfs in North East England where marine-dredged sand and gravel was landed and processed was 451,315 tonnes in 2013. This represents a decrease in sales of 60% when compared with sales from marine wharfs in 2007 (1,132,000 tonnes). This decrease in sales from 2007 is considered to be mainly a result of the economic downturn and a resulting reduction in demand for primary aggregates. Following a significant decrease in sales in 2009, sales of marine dredged sand and gravel for aggregate use from North East England have remained at a similar level in the period from 2009 to 2013 reflecting current economic conditions. The economic conditions have resulted in Billingham Wharf on the River Tees and Gateshead Wharf on the River Tyne being mothballed by their operators. Both of these sites were inactive during 2012 and this has also had an effect on sales of marine sand and gravel.

Table 5.3: Sales of marine dredged sand and gravel for aggregate use from North East England, 2004 to 2013 (thousand tonnes)

Year	County Durham	Northumberland	Tees Valley	Tyne and Wear	**North East England**
2004	0	0	#	#	**1,110**
2005	0	0	#	#	**1,049**
2006	0	0	#	#	**1,142**
2007	0	0	#	#	**1,132**
2008	0	0	#	#	**998**
2009	0	0	#	#	**563**
2010	0	0	#	#	**678**
2011	0	0	#	#	**509**
2012	0	0	#	#	**491**
2013	0	#	#	#	**451**
Ten year sales average	**0**	**#**	**#**	**#**	**812**

Notes: # Confidential figure included in the figure for North East England

5.5 The sales of marine sand and gravel by broad end-use product categories are shown in Table 5.4. These end-use figures should be treated with some caution as, although operators know what products they sell, they cannot always be certain what the products will ultimately be used for. Concreting sand was the largest product for marine dredged sand and gravel sales in 2013, accounting for 90.1% of sales for

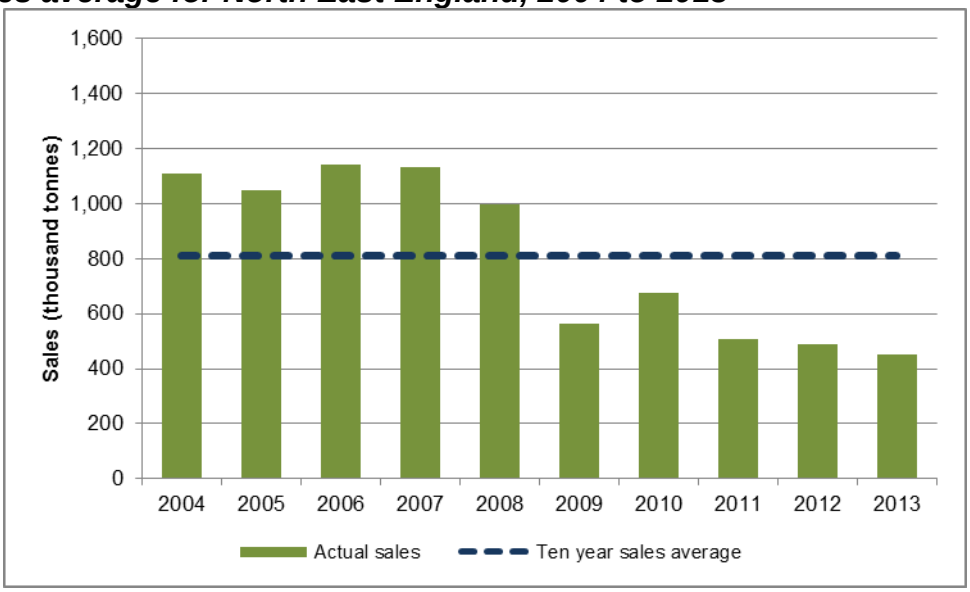
aggregate use. The other main products were gravel for concrete aggregate (4.2%), sand for asphalt (2.4%) and other screened or graded gravel (1.9%).

Table 5.4: Sales of marine-dredged sand and gravel from North East England for aggregate use by end-use in 2013 (tonnes)

End-use	Marine sand and gravel sales (tonnes)
Sand for asphalt	10,700
Sand for use in mortar	6,176
Sand for concreting and sharp sand	406,519
Gravel for asphalt	0
Gravel for concrete aggregate	18,779
Other screened/graded gravel	8,778
Other sand and gravel	0
Sand and gravel with unknown end-use	363
Total marine sand and gravel	**451,315**

5.6 A comparison between the ten year sales average and actual sales is shown in Figure 5.5. The ten year marine sand and gravel sales average from North East England is 812,300 tonnes. Sales of marine sand and gravel over the period between 2009 and 2013 are below the ten year sales average, following a significant reduction in sales compared to pre-2009. Sales have fallen below the ten year sales average due to a reduction in demand as a result of the economic downturn and a reduction in construction activity. While sales continue to be below average sufficient capacity exists at the wharf sites to increase the quantities of marine sand and gravel landed, particularly given that two of the wharfs in North East England remained mothballed in 2013.

Figure 5.5: Comparison of actual sales of marine sand and gravel and the ten year sales average for North East England, 2004 to 2013



6. Recycled and secondary aggregates

6.1 National planning policy, as set out in the National Planning Policy Framework, is to encourage the use of alternatives to primary aggregates. The guidelines for the provision of aggregates over the period from 2005 to 2020, published in June 2009, assume a significant portion of the supply will be met from recycled and secondary aggregates (see Table 2.1).

6.2 The 2013 aggregates monitoring survey collected data on sales of recycled and secondary materials for aggregate use. This involved surveying the operators of 'fixed' construction and demolition recycling sites and secondary aggregates producers in North East England. The figures should, be treated with some degree of caution as not all producers in North East England responded to the survey and have thus not been included in the figures. In addition, the survey does not include mobile crushers and screens which are known to make a significant contribution in terms of the quantities of construction and demolition waste recycled for aggregate uses.

6.3 The survey found that North East England produces recycled aggregates from construction and demolition projects and secondary aggregates from industrial by-products. Secondary aggregates are produced from pulverised fuel ash and furnace bottom ash at the Lynemouth Power Station in Northumberland, ash from the Energy for Waste Plant at Haverton Hill on Teesside and materials originating from the steelworks at Redcar. Table 6.1 records recycled and secondary aggregate sales in North East England of 1.26 million tonnes in 2013.

6.4 Sales of recycled and secondary aggregates from North East England in 2013 are at a similar level to those in the previous monitoring periods and this reflects a lower level of sales due to the economic downturn and the prevailing economic conditions. These economic conditions, including the reduction in construction activity, have also resulted in a number of sites across North East England ceasing the production of recycled and secondary aggregates. The deficiencies with data make it difficult to analyse these trends in detail.

Table 6.1: Sales of recycled and secondary aggregates in North East England, 2013 (thousand tonnes)

	County Durham	Northumber-land	Tees Valley	Tyne and Wear	**North East England**
Construction and demolition waste	93.7	63.6	30.0	397.3	**584.6**
Road planings	1.5	5.0	0.0	43.3	**49.8**
Spent railway track ballast	0.0	0.0	0.0	19.0	**19.0**
Colliery spoil	0.0	0.0	0.0	45.6	**45.6**
Furnace Bottom Ash (Power stations)	0.0	30.1	0.0	0.0	**30.1**
Pulverised Fuel Ash (Power stations)	0.0	27.3	0.0	0.0	**27.3**
Incinerator Bottom Ash (Energy from Waste)	0.0	0.0	121.0	0.0	**121.0**
Slag: Blast furnace (Iron)	0.0	0.0	0.0	0.0	**0.0**
Slag: Basic oxygen furnace (Steel)	0.0	0.0	376.8	0.0	**376.8**
Spent foundry sand	0.0	0.0	0.0	0.0	**0.0**
Waste glass	0.0	0.0	0.0	0.5	**0.5**
Other	0.0	0.0	0.0	3.2	**3.2**
Total	95.3	126.0	527.8	508.9	**1,258.1**

7. Development Plans

Regional Spatial Strategy for North East England

7.1 Following the General Election in May 2010 the Government committed to abolishing all Regional Spatial Strategies. Through the Localism Act 2011 the Government put in place the legislation that allowed the Regional Spatial Strategies to be revoked. The Regional Spatial Strategy for North East England was revoked on 15 April 2013 and now no longer forms part of the statutory development plan for the Mineral Planning Authority areas in North East England.

Local Plans

7.2 Local Planning Authorities are required to prepare 'Local Plans' for their areas, which set out the planning policies to guide and assess development proposals. This includes policies for minerals development prepared by these authorities in their role as a Mineral Planning Authority. Progress with the preparation local development plan documents in North East England is discussed in more detail below and the key milestones for preparation of plans are shown in Appendix 4.

County Durham

7.3 Durham County Council, a unitary authority, is preparing a Local Plan for County Durham. This plan will incorporate strategic policies on minerals extraction and strategic mineral site allocations. Consultation on Preferred Options document took place between 10 September 2012 and 26 November 2012 and consultation on the Pre-Submission Draft Local Plan took place between 14 October and 6 December 2013. The Plan was submitted to the Secretary of State on 25 April 2014. Part 1 of the examination started on 1 October 2014 and closed on 19 November 2014. Part 1 of the examination considered strategic issues and strategic sites. Part 2 and Part 3 of the examination will commence in 2015. Part 2 of the examination will consider non-strategic housing and employment sites and Part 3 of the examination will consider the Community Infrastructure Levy and Charging Schedule for County Durham. A Minerals and Waste Policies and Allocations document is also to be prepared. This document will contain detailed development management policies for minerals and potentially non-strategic mineral site allocations. Work on this document will now commence in 2015 and it is anticipated that adoption will be in late 2016.

Northumberland

7.4 There are two Mineral Planning Authorities in the Northumberland sub-area. The Northumberland National Park Authority is the Mineral Planning Authority for the Northumberland National Park area and Northumberland County Council, a unitary authority, is the Mineral Planning Authority for the area of Northumberland outside the Northumberland National Park. These authorities have responsibility for preparing Local Plans for their respective areas, which will incorporate policies on minerals extraction.

7.5 The Northumberland National Park Authority adopted a Core Strategy and Development Policies document in March 2009. This document includes a policy on mineral extraction.

7.6 Northumberland County Council is currently preparing a Core Strategy, which will contain strategic minerals policies. Consultation on the Core Strategy Preferred Options took place between 6 February 2013 and 20 March 2013 and consultation on a full draft plan will take place between 12 December 2014 and 11 February 2015. The current programme identifies that consultation on a pre-submission document is will take place in summer 2015, followed by that submission in winter 2015. It is anticipated that adoption will be in summer 2016.

Tees Valley

7.7 The five mineral planning authorities in the Tees Valley sub-area (Darlington Borough Council, Hartlepool Borough Council, Middlesbrough Borough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council) have produced Joint Minerals and Waste Development Plan Documents for the Tees Valley area. The Tees Valley Joint Minerals and Waste Core Strategy Development Plan Document and the Tees Valley Joint Minerals and Waste Policies and Sites Development Plan Document were adopted in September 2011.

Tyne and Wear

7.8 The Tyne and Wear sub-area contains five metropolitan borough councils (Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland), which are the Mineral Planning Authorities for their respective areas. A summary of progress with Local Plans for each of these authorities is provided below:

- Gateshead Council and Newcastle City Council are preparing a Joint Core Strategy and Urban Core Plan document. Following extensive consultation from 2011 onwards the Plan was submitted to the Secretary of State in February 2014 and was subject to a public examination and hearing session in Summer and Autumn 2014. The Inspector's Interim Report, received in November 2014, recommended a number of modifications but indicated that the Plan is broadly sound. Adoption of the Plan is expected to be in Spring 2015.

- North Tyneside Council is producing a Local Plan. A consultation draft Local Plan was published in November 2013, with a further consultation draft scheduled for publication in January 2015.

- South Tyneside Council adopted a Core Strategy in June 2007, a document containing criteria-based policies for development management in December 2011 and a Site Allocations document in April 2012. Work is now underway to review these documents as part of a new-style Local Plan. Consultation on key issues and options took place between February and April 2013.

- Sunderland City Council is preparing a Core Strategy document and a separate Allocations document as part of their Local Plan. Work is currently concentrated on the Core Strategy, which will set out the strategic planning policies for Sunderland. A revised Core Strategy Preferred Options report was published for consultation in August 2013. At the time of writing Sunderland City Council are reviewing the timetable and it is expected that details will be available in early 2015.

8. Local Aggregate Assessments

8.1 The publication of the National Planning Policy Framework in 2012 introduced a requirement for all Mineral Planning Authorities to prepare an annual Local Aggregate Assessment. This section of the monitoring report reports on the status of the LAAs for each of the Mineral Planning Authorities in North East England and the provision for aggregates made within them.

Purpose of a Local Aggregate Assessment

8.2 National Planning Practice Guidance advises that a Local Aggregate Assessment should contain three elements:

- A forecast of the demand for aggregates based on the rolling average of ten years sales data and other relevant local information;
- an analysis of all aggregate supply options, including land-won resources, recycled aggregates, secondary aggregates, marine aggregates and imports/exports; and
- an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation.

The LAA should then conclude if there is a shortage or a surplus of supply to meet demand and, if the former, how this is being addressed.

Progress with Local Aggregate Assessments in North East England

8.3 A summary of progress with the preparation of Local Aggregate Assessments in North East England is provided in Table 8.1. The Mineral Planning Authorities in County Durham, Northumberland and Tyne and Wear have worked together to produce a Joint Local Aggregate Assessment. The five Tees Valley authorities are also working together to produce a Local Aggregate Assessment but at the time of writing a draft document was not available. It is anticipated that a draft Local Aggregate Assessments for the five Tees Valley authorities will be available for submission to the North East Aggregates Working Party shortly.

Provision for aggregates in the LAAs for North East England

8.4 The provision for aggregates that is detailed in the Local Aggregate Assessments is summarised in Table 8.1 below. For the Mineral Planning Authorities in County Durham, Northumberland and Tees Valley the suggested provision has been based on the ten year sales average (over the period from 2004 to 2013) with an uplift to take account of a proposed increase in house building identified in emerging and adopted Local Plans. In the absence of a Local Aggregate Assessment for Tees Valley, Table 8.1 sets out the provision detailed in the Tees Valley Joint Minerals and Waste Core Strategy (adopted September 2011).

Table 8.1: Local Aggregate Assessment progress and provision for aggregates supply in North East England

Sub-area	Mineral Planning Authority	LAA date	LAA figure		Calculation method
			Crushed rock	Sand and gravel	
County Durham	Durham County Council	November 2013 (draft)	3,373,000 tonnes	319,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
Northumberland	Northumberland County Council	November 2013 (draft)	1,868,000 tonnes	593,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
	Northumberland National Park Authority	November 2013 (draft)			
Tees Valley	Darlington Borough Council	None	137,500 tonnes*	10,000 tonnes*	Figures for provision taken from the Joint Tees Valley Minerals and Waste DPDs (adopted September 2011)
	Hartlepool Borough Council	None			
	Middlesbrough Borough Council	None			
	Redcar and Cleveland Borough Council	None			
	Stockton on Tees Borough Council	None			
Tyne and Wear	Gateshead Metropolitan Borough Council	November 2013 (draft)	328,000 tonnes	334,000 tonnes	10 year sales average (2004 to 2013) with uplift for proposed housing growth
	Newcastle City Metropolitan Borough Council	November 2013 (draft)			
	North Tyneside Metropolitan Borough Council	November 2013 (draft)			
	South Tyneside Metropolitan Borough Council	November 2013 (draft)			
	Sunderland City Metropolitan Borough Council	November 2013 (draft)			
North East England	-	-	5,706,500 tonnes	1,256,000 tonnes	Total annual provision in LAAs in North East England

Notes:

** In absence of a LAA for the five Tees Valley authorities, the provision set out in the adopted Tees Valley Joint Minerals and Waste Core Strategy DPD is shown.*

Contribution to meeting local and national needs

8.5 For North East England, the combined figures in Local Aggregate Assessments make provision for 5.71 million tonnes of crushed rock per annum and 1.26 million tonnes of sand and gravel per annum. Such provision for crushed rock would exceed the ten year sales average by 22.2% and exceed the sales average for the last three monitoring periods by 51.0%. For sand and gravel, such provision would exceed the ten year sales average by 26.0% and exceed the sales average for the last three monitoring periods by 48.3%. Based upon the provision set out in the Local Aggregate Assessments, the landbank of permitted reserves at 31 December 2013 for sand and gravel is 13.1 years and 42.1 years for crushed rock. In respect to marine sourced aggregates, the wharfs within North East England are capable of maintaining and increasing supply.

8.6 On this basis the North East Aggregates Working Party consider that North East England is making a full contribution to both national and local aggregate needs and there is no undue reliance on imports of aggregates.

9. Major developments that have a greater than local influence on aggregates demand

9.1 The purpose of this section of the report is to identify major construction projects and significant developments that will have a significant influence on the demand for primary aggregates and recycled and secondary aggregates from sites in North East England. Table 9.1 provides a summary of current and planned projects that are considered to be of significance.

Table 9.1: Major construction projects and significant developments of note that could influence demand for aggregates

Project	Location	Details	Timeframe
A1 upgrade at Lobley Hill	Gateshead, Tyne and Wear	Upgrade of two junctions to include new parallel road links between the junctions and three lanes in each direction.	Construction summer 2014 to summer 2016.
Durham Northern Relief Road	Durham City, County Durham	3.35 km of single carriageway road.	To be completed by 2030.
Durham Western Relief Road	Durham City, County Durham	2.65 km of new single carriageway road.	Construction is expected to commence in March 2017. Works to be complete by December 2018.
Morpeth Northern Bypass	Morpeth, Northumberland	3.8 km of new single carriageway road.	Construction is expected to commence in spring 2015 and be complete by autumn 2016.
A1 Leeming to Barton	North Yorkshire	12 mile section of dual carriageway to be replaced with a new three lane motorway.	Construction 2014 to mid-2017

9.2 During 2013 there were no significant projects or developments taking place in North East England that were considered to have a significant impact on the demand for aggregates over and above those experienced in the previous ten year period. In addition, no significant future developments have been identified that are envisaged that will require an increase in the supply of aggregates over that experienced in the years prior to the economic downturn, which began in 2008. The scale of the projects identified in Table 9.1 are considered to be of a similar scale to projects that have taken place during the previous ten year period and in turn are considered to have a similar demand to that experienced over that period.

9.3 Outside of North East England, a 12 mile section of dual carriageway on the A1 road between Leeming and Barton in North Yorkshire is to be replaced with a new three lane motorway. Construction work commenced in 2014 and be completed by mid-2017. This major road scheme could have an influence on supply from quarries and wharfs in North East England, particularly the sites in southern County Durham that are geographically close to the project in North Yorkshire.

Appendix 1: Primary aggregates producing sites included in the Monitoring Report

This appendix details the sites that have been included in the aggregates sales and/or reserve figures in this report. The sites included are those that were active during 2013 (i.e. were in production during 2013) or were inactive during 2013 (i.e. not in production during 2013 but have a valid planning permission for extraction). Dormant sites or sites that do not have a valid planning permission are not included and have not been included in the figures in this report. The planning status of the quarries can be summarised as follows:

- Active: In production, including from stockpiles, at some point during 2013
- Inactive: Not in production during 2013 but has either been worked in the past or has yet to be worked and has a valid planning permission for extraction

This appendix also details selected designations that either wholly or partially overlap with the quarry or wharf sites. The designations included are National Parks, Areas of Outstanding Natural Beauty (AONBs), Sites of Special Scientific Interest (SSSI), Special Protection Areas (SPAs), Special Areas of Conservation (SACs) and Green Belt.

The site operator details are correct as at 31 December 2013.

QUARRIES

County Durham quarries

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Aycliffe East Quarry	Aycliffe NZ 290 222	Stonegrave Aggregates	Magnesian limestone	Active	
Bishop Middleham Quarry	Ferryhill NZ 328 326	W & M Thompson	Magnesian limestone	Active	SSSI
Broadwood Quarry	Frosterley NZ 035 365	Sherburn Stone	Carboniferous limestone	Inactive	
Cornforth Quarry	West Cornforth NZ 325 344	Lafarge Tarmac	Magnesian limestone	Inactive	
Coxhoe (Raisby) Quarry	Coxhoe NZ 347 352	Hope Construction Materials	Magnesian limestone	Active	SSSI
Crime Rigg Quarry	Sherburn Hill NZ 346 416	Sherburn Stone	Magnesian limestone and Permian sand	Active	SSSI
Heights Quarry	Westgate NY 925 388	Aggregate Industries UK	Carboniferous limestone	Active	AONB
Hulands Quarry	Bowes NZ 016 140	Aggregate Industries UK	Carboniferous limestone	Active	
Hummerbeck Quarry	West Auckland NZ 194 259	Hall Construction	Sand and gravel	Inactive	
Kilmond Wood Quarry	Bowes NZ 024 134	Cemex	Carboniferous limestone	Active	

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Low Harperley Quarry	Wolsingham NZ 411 535	Sherburn Stone	Sand and gravel	Inactive (yet to begin)	
Middleton (Force Garth) Quarry	Middleton in Teesdale NY 872 282	Cemex	Igneous rock	Active	AONB, SAC, SPA, SSSI
Old Quarrington and Cold Knuckle Quarry	Bowburn NZ 330 380	Lafarge Tarmac	Magnesian limestone and Permian Sand	Active	SSSI
Running Waters Quarry	Bowburn NZ 334 403	Sherburn Stone	Magnesian limestone	Inactive	
Thrislington Quarry	Ferryhill NZ 317 322	Lafarge Tarmac	Magnesian limestone and Permian sand	Active	SAC, SSSI
Witch Hill Quarry	Bowburn NZ 345 397	Sherburn Stone	Magnesian limestone	Inactive	

Northumberland quarries

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Barrasford Quarry	Barrasford NY 913 743	Lafarge Tarmac	Igneous rock and Carboniferous limestone	Active	
Belford (Easington) Quarry	Belford NU 130 343	Lafarge Tarmac	Igneous rock	Inactive	
Broadoak Quarry	Ebchester NZ 098 547	Lafarge Tarmac	Sand and gravel	Active	Green Belt
Caistron Quarry	Thropton NU 007 016	North East Concrete	Sand and gravel	Closed	
Cocklaw Quarry	Wall NY 931 701	Tynedale Roadstone	Carboniferous limestone	Inactive	
Cragmill Quarry	Belford NU 108 346	Cemex	Igneous rock	Active	
Divethill Quarry	Great Bavington NY 978 795	Cemex	Igneous rock	Active	
Haughton Strother Quarry	Humshaugh NY 897 740	W & M Thompson	Sand and gravel	Active	
Harden Quarry	Biddlestone NY 959 086	Lafarge Tarmac	Igneous rock	Active	National Park
Hedgeley Quarry	Powburn NZ 068 180	North East Concrete	Sand and gravel	Active	SSSI, SAC

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Hemscott Hill Beach	Widdrington NZ 931 703	Mr W Bell	Sand and gravel	Active	SSSI
Hollings Hill Quarry	Ebchester NZ 098 574	Lafarge Tarmac	Sand and gravel	Active	Green Belt
Howick Quarry	Longhoughton NU 238 169	Lafarge Tarmac	Igneous rock	Active	
Keepershield Quarry	Humshaugh NY 895 727	Hanson	Igneous rock and Carboniferous limestone	Active	SSSI
Lanton (Cheviot) Quarry	Milfield NT 954 311	Lafarge Tarmac	Sand and gravel	Active	
Longhoughton Quarry	Longhoughton NU 232 153	Purvis	Igneous rock	Active	SSSI
Merryshields Quarry	Stocksfield NZ 063 617	SITA UK	Sand and gravel	Inactive	Green Belt
Mootlaw Quarry	Matfen NZ 018 755	North Tyne Roadstone	Carboniferous limestone	Inactive	
Swinburne Quarry	Colwell NZ 021 791	Hanson	Igneous rock	Inactive	
Wooperton Quarry	Wooperton NU 048 204	Cemex	Sand and gravel	Inactive	

Tees Valley quarries

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Hart Quarry	Hartlepool NZ 475 345	Hart Aggregates	Magnesian limestone	Active	
Hartlepool Beach	Hartlepool NZ 540 270	Cemex	Sand	Inactive	
Stockton (Thorpe Thewles) Quarry	Stockton NZ 415 245	Cemex	Sand and gravel	Inactive	

Tyne and Wear quarries

Site	Location and Grid Reference	Operator in 2013	Mineral	Planning status in 2013	Designations
Crawcrook Quarry	Gateshead NZ 128 638	Cemex	Sand and gravel	Inactive	Green Belt
Marsden Quarry	Whitburn NZ 406 642	Owen Pugh	Magnesian limestone	Active	Green Belt
Eppleton Quarry	Hetton-le-Hole NZ 360 482	Eppleton Quarry Products	Magnesian limestone and sand	Active	

MARINE WHARFS

Northumberland marine wharfs

Site	Location and Grid Reference	Operator in 2013	Mineral	Status in 2013	Designations
Battleship Wharf	Cambois NZ 509 202	Lafarge Tarmac	Sand and gravel	Active	

Tees Valley marine wharfs

Site	Location and Grid Reference	Operator in 2013	Mineral	Status in 2013	Designations
Cochranes Wharf	Middlesbrough NZ 509 202	Lafarge Tarmac	Sand and gravel	Active	
Billingham (Able) Wharf	Billingham NZ 479 214	Cemex	Sand and gravel	Inactive	

Tyne and Wear marine wharfs

Site	Location and Grid Reference	Operator in 2013	Mineral	Status in 2013	Designations
Howdon Wharf	North Shields NZ 335 661	Lafarge Tarmac	Sand and gravel	Active	
Gateshead Wharf	Gateshead NZ 265 638	Lafarge Tarmac	Sand and gravel	Inactive	

Site	Location and Grid Reference	Operator in 2013	Mineral	Status in 2013	Designations
Sunderland (Greenwells Quay) Wharf	Sunderland NZ 409 579	Northumbrian Roads	Sand and gravel and igneous rock	Active	
Jarrow Wharf	South Shields NZ 335 657	Cemex	Sand and gravel	Active	

Appendix 2: List of fixed sites producing recycled and secondary aggregates

The fixed recycled and secondary aggregates sites included in the recycled and secondary aggregates figures from the 2013 aggregates monitoring survey are detailed below.

Sub-area	Site	Location and Grid Reference	Operator in 2013	Status in 2013	Materials
County Durham:	Aycliffe Quarry	Aycliffe NZ 290 222	Stonegrave Aggregates	Active	Construction, demolition and excavation waste
	Constantine Farm	Crook NZ 172 336	W Marley	Active	Construction, demolition and excavation waste
	Fallow Field Yard	South Hetton NZ 383 449	Burn Hewitt	Closed	Construction, demolition and excavation waste
	Joint Stocks Quarry	Coxhoe NZ 328 363	Premier	Inactive	Construction, demolition and excavation waste
	Old Brickworks	Tanfield NZ 194 548	Ken Thomas	Active	Construction, demolition and excavation waste
	Old Quarrington Quarry	Bowburn NZ 330 380	Lafarge Tarmac	Active	Construction, demolition and excavation waste
	Thrislington Quarry	West Cornforth NZ 317 322	Lafarge Tarmac	Active	Construction, demolition and excavation waste
Northumberland:	Barrington Industrial Estate	Bedlington NZ 264 836	JBT Waste Services	Active	Construction, demolition and excavation waste
	Linton Transfer Station	Linton NZ 262 914	Thornton	Active	Construction, demolition and excavation waste

Sub-area	Site	Location and Grid Reference	Operator in 2013	Status in 2013	Materials
	Longhoughton (Ratcleugh) Quarry	Longhoughton NU 232 153	Purvis	Inactive	Construction, demolition and excavation waste
	Lynemouth Power Station	Lynemouth NZ 305 901	RioTinto Alcan	Active	Power station waste – furnace bottom ash and pulverised fuel ash
	Prestwick Pit	Ponteland NZ 182 712	Holystone	Active	Construction, demolition and excavation waste
	Thornbrough Quarry	Corbridge NZ 008 635	W & M Thompson	Active	Construction, demolition and excavation waste
	9 West Sleekburn Industrial Estate	Bedlington NZ 277 847	HFF Civil Engineering	Active	Construction, demolition and excavation waste
Tees Valley:	Cochranes Wharf	Middlesbrough NZ 515 527	Lafarge Tarmac	Active	Construction, demolition and excavation waste
	Dockside Road	Middlesbrough NZ 527 212	Eppleton Quarry Products	Active	Blast furnace slag
	Haverton Hill EfW Facility	Stockton on Tees NZ 480 225	SITA UK	Active	Incinerator bottom ash
	Haverton Hill Road	Stockton on Tees NZ 483 226	Tonks	Active	Construction, demolition and excavation waste
	Teesport	Redcar NZ 538 228	Lafarge Tarmac	Active	Blast furnace slag
Tyne and Wear:	Eppleton Quarry	Hetton le Hole NZ 360 482	Eppleton Quarry Products	Active	Colliery spoil

Sub-area	Site	Location and Grid Reference	Operator in 2013	Status in 2013	Materials
	Deptford Transfer Station	Sunderland NZ 387 580	Alex Smiles	Active	Construction, demolition and excavation waste
	Hayhole Road	North Shields NZ 343 665	Owen Pugh	Active	Construction, demolition and excavation waste
	Hudson Dock	Sunderland NZ 414 572	Northumbrian Roads	Active	Construction, demolition and excavation waste; Road planings
	Marsden Quarry	Whitburn NZ 406 642	Owen Pugh	Active	Construction, demolition and excavation waste
	Newburn	Newcastle NZ 185 643	MGL Group	Active	Construction, demolition and excavation waste
	Springwell Quarry	Washington NZ 283 586	W & M Thompson	Active	Construction, demolition and excavation waste
	Stephenson Street	Willington Quay NZ 324 661	G O'Brien	Active	Construction, demolition and excavation waste

Appendix 3: Planning applications for primary aggregates extraction

The planning applications granted, refused or withdrawn in North East England during 2013 and the planning applications awaiting a decision at 31 December 2013 are detailed below.

Site Name and Location	Mineral Planning Authority	Operator / Applicant	Mineral	Tonnage (for aggregate use)	Type of Application	Submitted	Decision
County Durham:							
Hawthorn Seaham (NZ 435 464)	Durham County Council	Lafarge Tarmac	Magnesian limestone	4,000,000	Determination of modern conditions for a dormant site	10 May 2000	Pending at 31 December 2013
Harrow and Ashy Bank Eastgate (NY 956 395)	Durham County Council	Lafarge Tarmac	Carboniferous limestone	3,750,000	Determination of modern conditions for a dormant site	24 May 2007	Pending at 31 December 2013
Low Harperley Wolsingham (NZ 411 535)	Durham County Council	Sherburn Stone	Sand and gravel	2,500,000	New site	31 July 2009	Granted 19 August 2013
Bishop Middleham Ferryhill (NZ 328 326)	Durham County Council	W&M Thompson	Magnesian limestone	2,300,000	Extension to existing site	26 February 2013	Pending at 31 December 2013
Other applications of note in County Durham: New working and restoration conditions for Aycliffe Quarry were issued on 2 July 2013 following a periodic review. There were three periodic reviews pending determination at 31 December 2013. These periodic reviews are for Middleton (Force Garth) Quarry (submitted November 2011), Running Waters Quarry (submitted 18 September 2012) and Kilmond Wood Quarry (submitted 23 October 2013).							

Site Name and Location	Mineral Planning Authority	Operator / Applicant	Mineral	Tonnage (for aggregate use)	Type of Application	Submitted	Decision
Northumberland:							
No relevant planning applications granted, refused or pending consideration in 2013.							
Tees Valley:							
No relevant planning applications granted, refused or withdrawn in 2012 or pending consideration at 31 December 2013.							
Tyne and Wear:							
Crawcrook Gateshead (NZ 138 637)	Gateshead Council	SITA UK and Cemex	Sand and gravel	550,000	Extension to existing site	26 September 1997	Pending at 31 December 2013
Eppleton Sunderland (NZ 359 482)	Sunderland City Council	Eppleton Quarry Products	Magnesian Limestone and Permian Sand	Mag. Limestone - 6,000,000; Permian Sand – 6,000,000	Extension to existing site	19 December 2007	Pending at 31 December 2013

Appendix 4: Key milestones and progress with local minerals plan documents

The key milestones for the preparation of local minerals plan documents in North East England, as at 31 December 2014, are detailed below. This is based on the latest information supplied by the Mineral Planning Authorities and in a number of cases the milestones are subject to final agreement.

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
Durham County	County Durham Plan	Issues and options – June 2010; Preferred options – September 2012	October 2013	25 April 2014	Part 1 – October 2014; Part 2 and Part 3 – 2015 (dates to be confirmed).	Autumn/Winter 2015	Part 1 of the examination considered strategic issues and sites. Part 2 of the examination will consider non-strategic housing and employment sites and Part 3 will consider Community Infrastructure Levy.
	Minerals and Waste Policies and Allocations	April 2015	September 2015	February 2016	June 2016	October 2016	
Northumberland County	Northumberland Local Plan Core Strategy	Issues and Options – May 2012; Preferred Options 1 – February 2013; Preferred Options 2 – October 2013; Full Draft Plan – 12 December 2014 to 11 February 2015.	Summer 2015	Winter 2015	Summer 2016	Winter 2016	

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
Northumberland National Park	Core Strategy and Development Policies	Complete	Complete	Complete	Complete	Complete (March 2009)	The Core Strategy and Development Policies document was adopted in March 2009.
Tees Valley authorities (Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland and Stockton-on-Tees)	Joint Minerals and Waste Core Strategy	Complete (Issues and Options – May 2007; Preferred Options – February 2008)	Complete (August 2009 and August 2010)	Complete (November 2010)	Complete (February 2011)	Complete (September 2011)	Joint Minerals and Waste DPDs have been prepared by the five Mineral Planning Authorities in Tees Valley. These DPDs were adopted in September 2011.
	Joint Minerals and Waste Site Allocations	Complete (Issues and Options – May 2007; Preferred Options – February 2008)	Complete (August 2009 and August 2010)	Complete (November 2010)	Complete (February 2011)	Complete (September 2011)	
Gateshead and Newcastle	Joint Core Strategy and Urban Core Plan	Early engagement – January 2011, September 2011 and June 2012.	September 2013	February 2014	June to July 2014 and reconvened in October 2014	Spring 2015	Gateshead and Newcastle councils are preparing a joint Core Strategy and Urban Core Plan. Strategic policies for minerals will be included in this document.

Mineral Planning Authority	Development Plan Document (DPD)	Early Engagement	Publication	Submission	Examination	Adoption	Comments
North Tyneside	Local Plan	Issues and Options – December 2006; Preferred Options – July 2010; Consultation draft – November 2013.	August 2015	November 2015	February 2016	July/August 2016	Revised timetable set out in Local Development Scheme, agreed October 2014.
South Tyneside	Local Plan – including strategic and local spatial policies and site allocations	Issues and Options – February 2013	Summer/Autumn 2015	circa 2015/2016	circa 2016/2017	circa 2016/2017	The Core Strategy was adopted in June 2007, the Development Management Policies DPD was adopted in December 2011 and the Site Specific Allocations DPD was adopted in March 2012. Work is now underway to review these documents as part of a new-style Local Plan.
Sunderland	Core Strategy and Development Management Policies	Issues and Options – 2005; Core Strategy Preferred Options – 2007; Alternative options – September 2009; Revised Preferred Options – August 2013.	Spring 2013	Winter 2014	Winter 2014/2015	Winter 2015	

Source: Mineral Planning Authorities

Appendix 5: North East Aggregates Working Party – List of Members

Chair:
Frances Wilkinson

Secretary:
Kevin Tipple

Mineral Planning Authority representatives:
Darlington Borough Council – David Nelson
Durham County Council – Jason Mckewon
Gateshead Council – Chris Carr
Hartlepool Borough Council – Helen Williams
Middlesbrough Borough Council – David Marjoram
Newcastle City Council – Louise Moody
North Tyneside Council – Laura Hewitt
Northumberland County Council – Kevin Tipple
Northumberland National Park Authority – Tony Gates
Redcar and Cleveland Borough Council – Fiona McGloin
South Tyneside Council – Ben Stubbs
Sunderland City Council – Gary Clasper
Stockton on Tees Council – Rebecca Wren

Central Government representatives
Department for Communities and Local Government – Nick Tennant

Aggregates Industry representatives:
Aggregates Industries UK Limited – Geoff Storey
British Aggregates Association (and Sherburn Stone Co. Ltd.) – Michael Hodges
CEMEX UK Marine Limited – Graham Singleton
CEMEX UK Operations Limited – Mark Kelly
Hanson Aggregates – Tom Brown
Hope Construction Materials Limited – Mike Young
Lafarge Tarmac Limited – Nick Beale
Mineral Products Association (MPA) – Ken Hobden

Membership as at 31 December 2014

Appendix 6: North East Aggregates Working Party – Published Reports

The following reports have been published by the North East Aggregates Working Party:

- Annual Report 2000/Aggregates Monitoring 1999 (£10.00)
- Annual Report 2001/Aggregates Monitoring 2000 (£10.00)
- Annual Report 2002/Aggregates Monitoring 2001 (£10.00)
- Annual Report 2003/Aggregates Monitoring 2002 (£10.00)
- Annual Aggregates Monitoring Report 2003 (£10.00)
- Annual Aggregates Monitoring Report 2004 (£10.00)
- Annual Aggregates Monitoring Report 2005 (£10.00)
- Annual Aggregates Monitoring Report 2006 (£10.00)
- Annual Aggregates Monitoring Report 2007 (£10.00)
- Annual Aggregates Monitoring Report 2008 (£10.00)
- Annual Aggregates Monitoring Report 2009 (£10.00)
- Annual Aggregates Monitoring Report 2010 (£10.00)
- Annual Aggregates Monitoring Report 2011 (£10.00)
- Annual Aggregates Monitoring Report 2012 (£10.00)

Reports which are still in print may be purchased from the Secretary of the North East Aggregates Working Party. Cheques should be made payable to 'Northumberland County Council'.